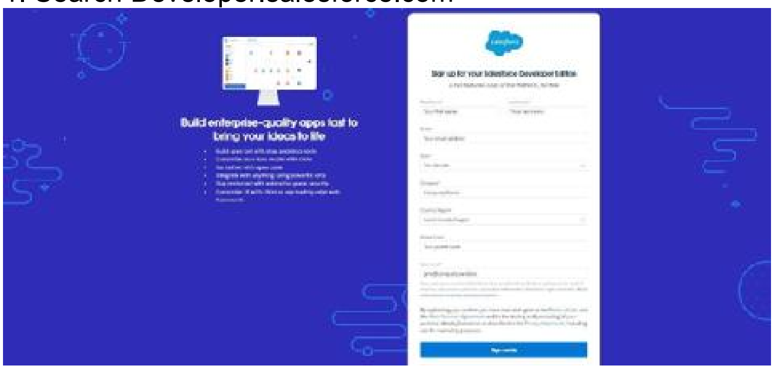
Build An Event Management System Using Salesforce :

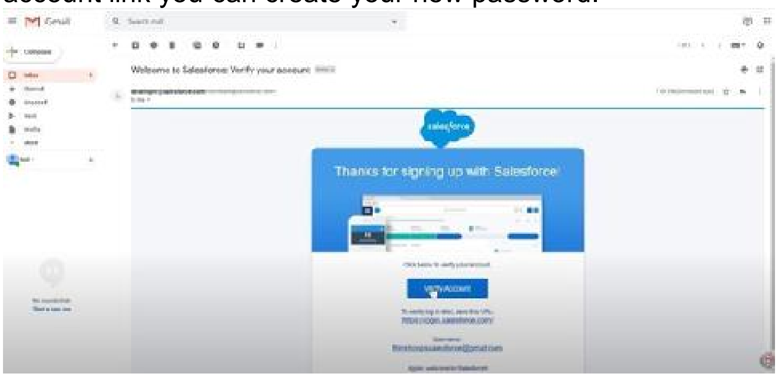
INTRODUCTION

The project aim is to provide real-time knowledge for all the students who have basic knowledge of Salesforce and Looking for a real-time project. This project will also help to those professionals who are in cross-technology and wanted to switch to Salesforce with the help of this project they will gain knowledge and can include into their resume as well.

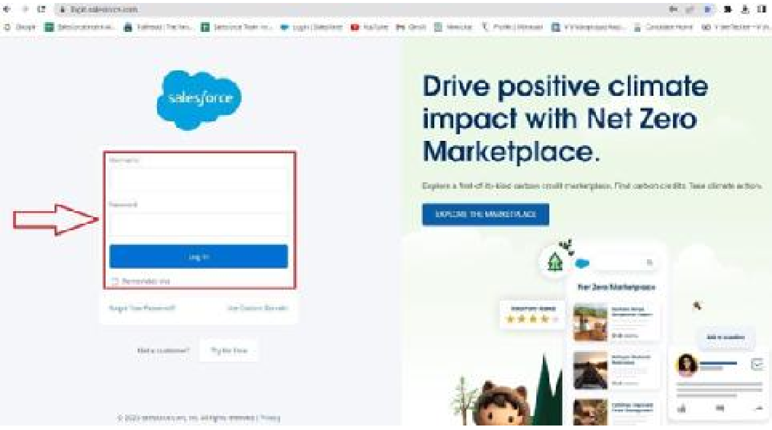
1. Search Developer.salesforce.com



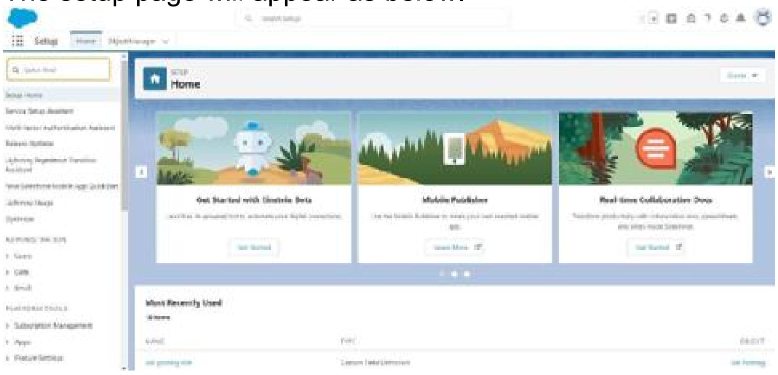
2. Enter the following details like First name, last name, Email, Role, Company, Country/Region, Postal code, and Username must be unique.
3. Click sign me up, after a few min you will reserve a mail salesforce org and by using the verify account link you can create your new password.



4. Click save.
5. Search login.salesforce.com
6. By using username and password you can into the salesforce org.



The setup page will appear as below.



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- ## Object
- **What is an object?**
- Salesforce objects are database tables that permit you to store data that is specific to an organization. It consists of fields (columns) and records (rows).
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- **Salesforce objects are of two types:**
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- 1. Standard Objects: Standard objects are the kind of objects that are provided by salesforce.com such as users, contracts, reports, dashboards, etc.
- 2. Custom Objects: Custom objects are those objects that are created by users. They supply information that is unique and essential to their organization. They are the heart of any application and provide a structure for sharing data.
- ## Tab
- Tabs in Salesforce help users view the information at a glance. It displays the data of objects and other web content in the application.

  There are mainly 4 types of tabs:

  Standard Object Tabs:
  Standard object tabs display data related to standard objects.

Custom Object Tabs:
Custom object tabs display data related to custom objects. These tabs look and function just like standard tabs.

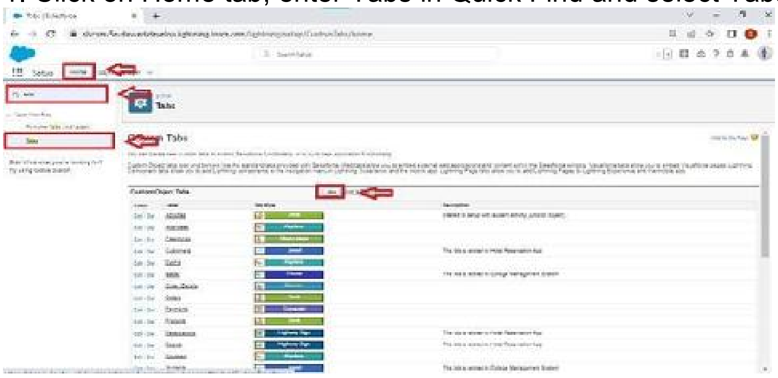
Web Tabs:
Web Tabs display any external Web-based application or Web page in a Salesforce tab.

Visualforce Tabs:
Visualforce Tabs display data from a Visualforce Page.

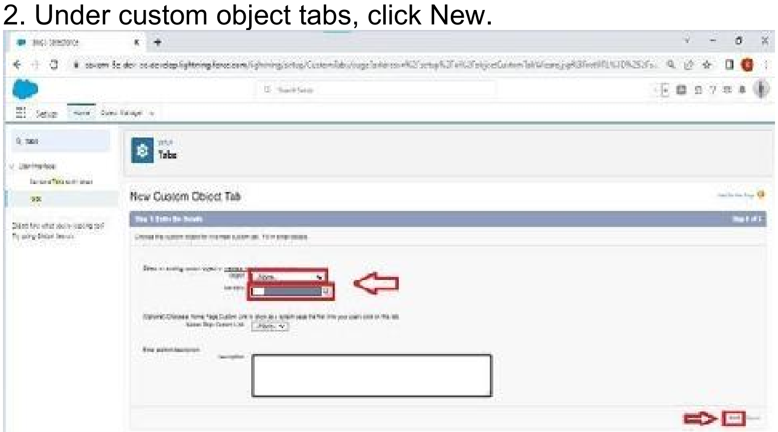
NOTE: we won't be dealing with web tabs and visualforce tabs later.

- # Creation Of Occasion Tab:
- Now create a custom tab.

1. Click on Home tab, enter Tabs in Quick Find and select Tabs.



2. Under custom object tabs, click New.



3. For Object, select Occasion.
4. For Tab Style, select any icon.
5. Leave all defaults as is. Click Next, Next, and Save.

Creation Of Attendee Tab:

- Now create a custom tab.
- 1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
- 2. Under custom object tabs, click New.
- 3. For Object, select Attendee.
- 4. For Tab Style, select any icon.
- 5. Leave all defaults as is. Click Next, Next, and Save.

- # Creation Of Speakers Tab:
- Now create a custom tab.
- 1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
- 2. Under custom object tabs, click New.
- 3. For Object, select Speaker.

- 4. For Tab Style, select any icon.
- 5. Leave all defaults as is. Click Next, Next, and Save

Creation Of Vendor Tab

- Now create a custom tab.
  1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
  2. Under custom object tabs, click New.
  3. For Object, select Vendor.
  4. For Tab Style, select any icon.
  5. Leave all defaults as is. Click Next, Next, and Save.

- ## Creation Of Event Service Tab

- Now create a custom tab.
  1. Click on Home tab, enter Tabs in Quick Find and select Tabs.
  2. Under custom object tabs, click New.
  3. For Object, select Event Service.
  4. For Tab Style, select any icon.
  5. Leave all defaults as is. Click Next, Next, and Save.

Lightning App

What is an App?

Apps in Salesforce are a group of tabs that help the application function by working together as a unit. It has a name, a logo, and a particular set of tabs. The simplest app usually has just two tabs.

There are 2 types of Salesforce applications:

- Standard apps: these apps come with every occurrence of Salesforce as default. Community, Call Center, Content, Sales, Marketing, Salesforce Chatter, Site.com, and App Launcher are included in these apps. The description, logo, and label of a standard app cannot be altered.
- Custom apps: these apps are created according to the needs of a company. They can be made by putting custom and standard tabs together. Logos for custom apps can be changed.

Fields And Relationships

What are fields?

Fields in Salesforce represents what the columns represent in relational databases. It can store data values which are required for a particular object in a record.

There are 2 types of fields in salesforce:

- Standard fields: There are four standard fields in every custom object that are Created By, Last Modified By, Owner, and the field created at the time of the creation of an object.
- These fields cannot be deleted or edited and they are always required. For standard objects, the fields which are present by default in them and cannot be deleted from standard objects are standard fields.

- Custom fields: The Custom fields which are added by the administrator/developer to meet the business requirements of any organization. They may or may not be required.

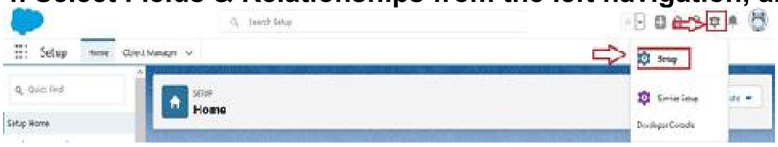
- # Creation Of Fields For The Occasion Objects

1. Click the gear icon and select Setup. This launches Setup in a new tab.

2. Click the Object Manager tab next to Home.

3. Select Occasion.

4. Select Fields & Relationships from the left navigation, and click New



Now we're ready to make a custom field. Let's do this!

5. Select the Text as the Data Type, then click Next.

6. For Field Label, enter City. And length (20).

7. Click Next, Next, then Save & New.

2. Similarly create an End Date field also.

Creation Of Fields For The Attendees Objects:

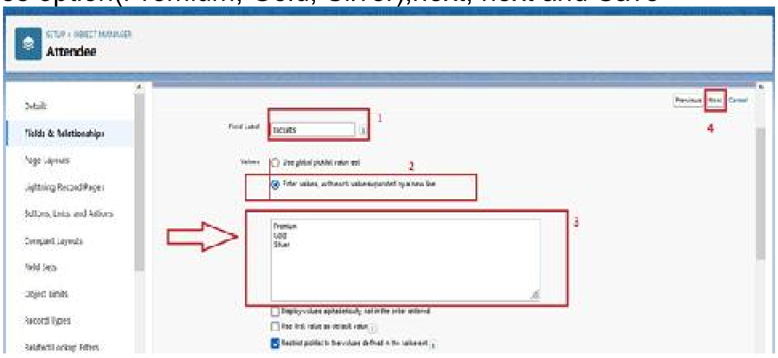
Follow the above steps from 1 to 4 of activity 1

1. Select the Auto number as the Data Type, then click Next. For Field Label, enter Id. & starting number(0001)
Click Next, Next, then Save & New
2. Select the phone as the Data Type, then click Next. For Field Label, Phone.
Click Next, Next, then Save & New.
3. Select the Email as the Data Type, then click Next. For Field Label, enter Email.
Click Next, Next, then Save & New.

4. Select Picklist as the Data Type and click Next. For Field Label enter Tickets. Select Enter values, with each value separated by a new line and enter these values:
Premium
Gold
Silver
Click Next, Next, then Save & New

Create picklist field for Attendees object

Click on the gear icon and then select Setup.
Click on the object manager tab just beside the home tab.
After the above steps, Select Attendee Object
Now Select Fields and relationships from setup menu of the Attendee object.
Click new and select Picklist fields ????next and enter label name(Tickets) and select enter values option(Premium, Gold, Silver),next, next and Save

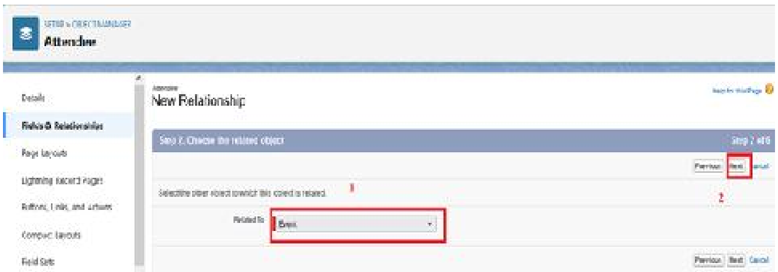


Creation Of Master-Detail Relationship

Follow the above steps from 1 to 4 of activity 1

Let's create a master-detail relationship with Occasion object

- Click fields & relationships and click new
- Select Master relationship & click next
- Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save.



Creation Of Fields For The Speakers Objects:

Follow the above steps from 1 to 4 of activity 1

1. Select the Text Area as the Data Type, then click Next. For Field Label, enter Bio.
   Click Next, Next, then Save & New.
2. Select the Email as the Data Type, then click Next. For Field Label, Email.
   Click Next, Next, then Save & New
3. Select the Phone as the Data Type, then click Next.
   For Field Label, Phone.
   Click Next, Next, then Save & New

Let's create a Lookup relationship with Occasion object

- Click fields & relationships and click new
- Select Lookup relationship & click next
- Choose the related object as Occasion & click next
- Give the field label(Event Name) & click next, next, next and Save

- # Creation Of Fields For The Vendors Objects:
- Follow the above steps from 1 to 4 of activity 1

  1. Select the phone as the Data Type, then click Next. For Field Label, Phone. Click Next, Next, then Save & New.
  2. Select the Email as the Data Type, then click Next. For Field Label, Email. Click Next, Next, then Save & New
  3. Select the Text as the Data Type, then click Next. For Field Label, enter Service Provider and length (30). Click Next, Next, then Save & New.
  4. Select Lookup Relationship as the Data Type and click Next. For Related to, enter Occasion.
     Click Next and For Field Label Event Name. Click Next, Next, Next and Save.

Creation Relationship On Event Service Objects:

Follow the above steps from 1 to 4 of activity 1

1. Let's create a Master-Detail relationship with Event Service object

- Click fields & relationships and click new
- Select Master-Detail relationship & click next
- Choose the related object as Occasion & click next Give the field label(Event Name) & click next, next, next and Save

2. Let's create a Master-Detail relationship with Event Service object

- Click fields & relationships and click new
- Select Master-Detail relationship & click next

Profile:

What is a profile?

A profile is a group/collection of settings and permissions that define what a user can do in salesforce. A profile controls “Object permissions, Field permissions, User permissions, Tab settings, App settings, Apex class access, Visualforce page access, Page layouts, Record Types, Login hours & Login IP ranges.

A profile can be assigned to many users, but user can be assigned single profile at a time.

Create A Profile With The Profile Name As “Event Vendors Profile”:

1. From Setup enter Profiles in the Quick Find box, and select Profiles.
2. From the list of profiles, find Standard User.
3. Click Clone.
4. For Profile Name, enter Event vendors profile.
5. Click Save.
6. While still on the Event profile page, then click Edit.
7. Scroll down to Custom Object Permissions and Give view all access permissions to the Attendees, speakers and vendors.

User

What is a user?

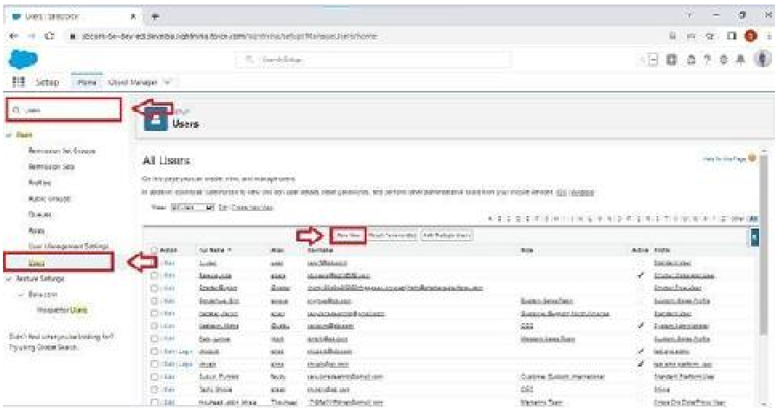
A user is anyone who logs in to Salesforce. Users are employees at your company, such as sales reps, managers, and IT specialists, who need access to the company's records. Every user in Salesforce has a user account. The user account identifies the user, and the user account settings determine what features and records the user can access.

NOTE- As Salesforce license can only be used by 2 Users at a time in Dev Org, so If you don't find Salesforce license then deactivate a user who has Salesforce license Or change the license type from Salesforce to any other.

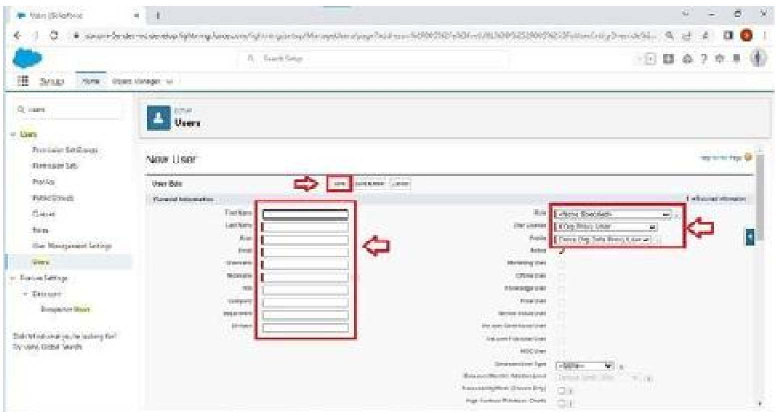
Creating A User

From setup type "users" in quick find and select users, then click New User

- First Name: Sanjay



- Last Name: Gupta
- Alias: Sanj
- Email: provide your personal email id for future reference
- Username: sanjaygupta@thesmartbridge.com
- Nickname: Sanju
- Role: leave it as default
- User License: Salesforce
- Profile: Event User Profile
- Click on save.



Creating A Another User

Create a user with a username as “Rahul Sharma”, and assign him the sales executive profile. From setup type “users” in quick find and select users, then click New User

- First Name: Rahul
- Last Name: Sharma
- Alias: Rahus
- Email: provide your personal email id for future reference
- Username: rahulsharma@thesmartbridge.com
- Nickname: Rahu
- Role: leave it as default
- User License: Salesforce Platform
- Profile: Event vendors profile

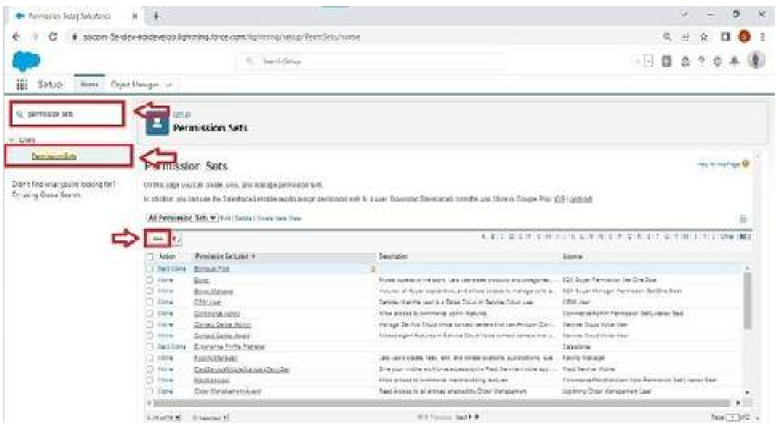
- # Permission Sets
- **What is a permission set?**
-

- A permission set is a collection of settings and permissions that give users access to various tools and functions. Permission sets extend users’ functional access without changing their profiles.
- Create permission sets to grant access among logical groupings of users, regardless of their
-

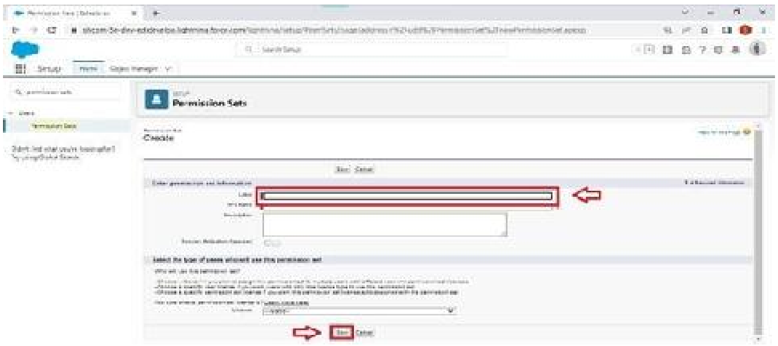
- primary job function. For example, let’s say you have several users who must delete and transfer leads. You can create a permission set based on the tasks that these users must perform and include the permission set within permission set groups based on job functions.

Creating A Permission Set:

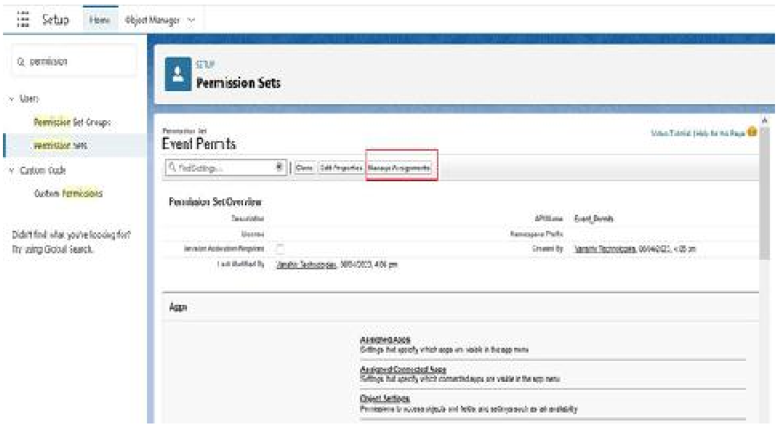
- From setup search “permission sets” in quick find and select permission set then click on New



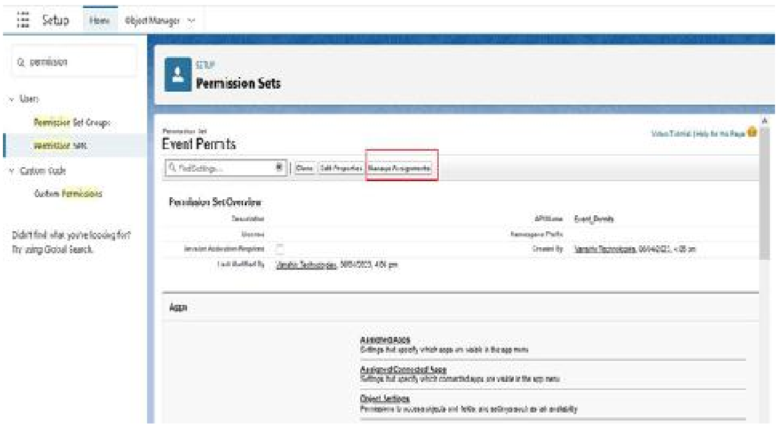
- Enter label as: Event Permits and Save.



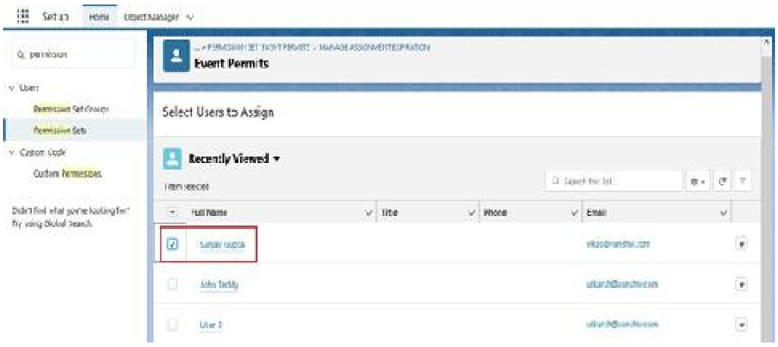
- After saving the permission click on the Manage assignment



- Now click on the Add Assignment



- Now select the users which you create and click on next Assign ,Done



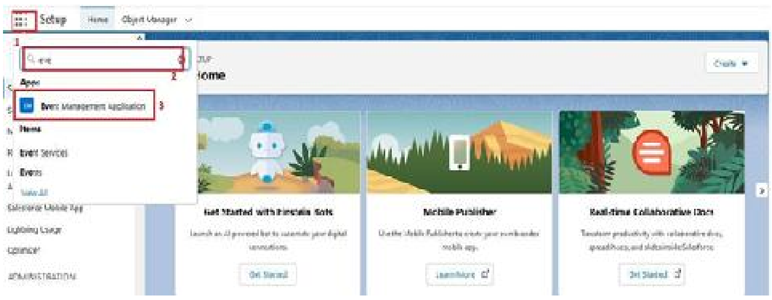
Creating A Another Permission Set

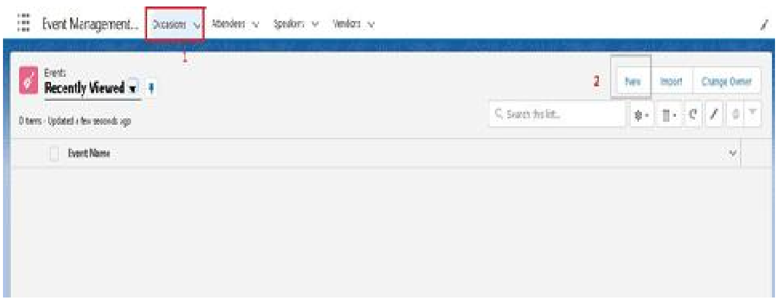
- From setup search “permission sets” in quick find and select permission set then click on New
- Enter label as: Vendor Permits and Save.
- After saving the permission click on the Manage assignment
- Now click on the Add Assignment
- Now select the users and click on next Assign ,Done

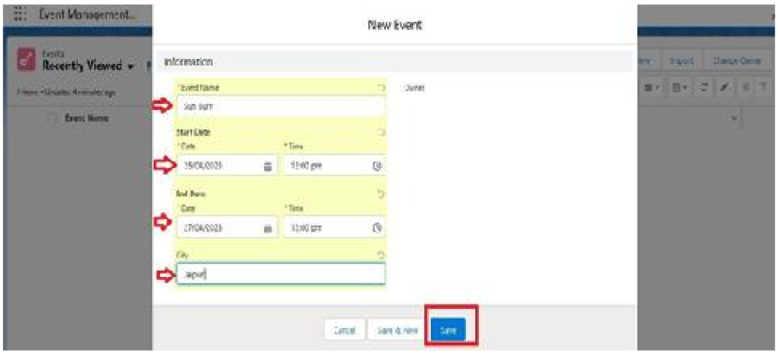
User Adoption

Create A Record (Occasion)

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Occasion Tab.
- Click new and fill details & Save





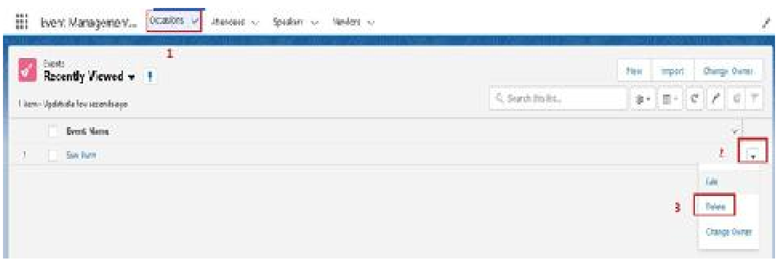


View A Record(Occasion)

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Occasion Tab.
- Click on any record name. you can see the details of the Event

Delete A Record(Occasion)

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Occasion Tab.
- Click on Arrow at right hand side on that Particular record.
- Click delete and delete again.



Reports

What are Reports?

Reports in Salesforce is a list of records that meet a particular criterion which gives an answer to a particular question. These records are displayed as a table that can be filtered or grouped based on any field.

There are 4 types of report formats in Salesforce:

1. Tabular Reports:
This is the most basic report format. It just displays the row of records in a table with a grand total. While easy to set up they can't be used to create groups of data or charts and also cannot be used in Dashboards. They are mainly used to generate a simple list or a list with a grand total.

2. Summary Reports:
It is the most commonly used type of report. It allows grouping of rows of data, view subtotal, and create charts.

3. Matrix Report:
It is the most complex report format. Matrix report summarizes information in a grid format. It allows records to be grouped by both columns and rows. It can also be used to generate dashboards. Charts can be added to this type of report.

4. Joined Reports:
These types of reports let us create different views of data from multiple report types. The data is joined reports are organized in blocks. Each block acts as a sub report with its own fields, columns, sorting, and filtering. They are used to group and show data from multiple report types in different views.

Report types:

Report type determines which set of records will be available in a report. Every report is based on a particular report type. The report type is selected first when we create a report. Every report type has a primary object and one or more related objects. All these objects must be linked together either directly or indirectly.

A report type cannot include more than 4 objects.
Once a report is created its report type cannot be changed.

There are 2 types of report types:

1. Standard Report Types:
Standard Report Types are automatically included with standard objects and also with custom objects where “Allow Reports” is checked.

Standard report types cannot be customized and automatically include standard and custom fields for each object within the report type. Standard report types get created when an object is created, also when a relationship is created.

Note: Standard report types always have inner joins.

2. Custom Report Types:
Custom report types are reporting templates created to streamline the reporting process. Custom Reports are created by an administrator or User with “Manage Custom Report Types” permission. Custom report types are created when standard report types cannot specify which records will be available on reports.

In custom report types we can specify objects which will be available in a particular report. The primary object must have a relationship with other objects present in a report type either directly or indirectly.

There are 3 types of access levels of folders:

1. Viewer:
With this access level, users can see the data in a report but cannot make any changes except

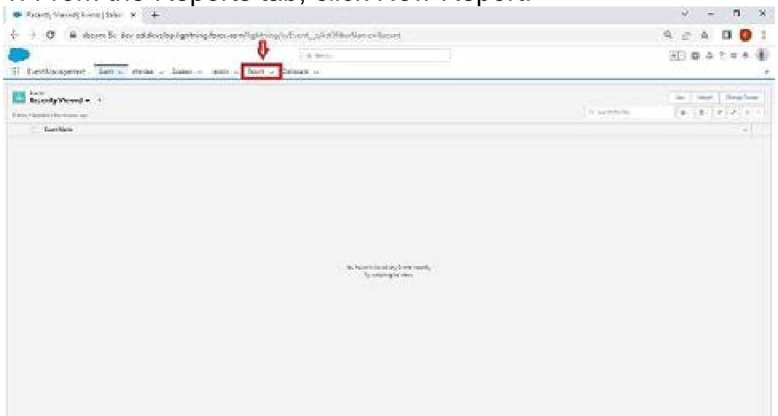
cloning it into a new report.

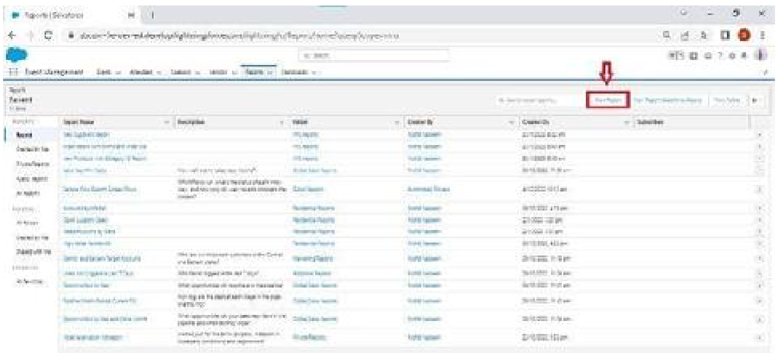
2. Editor:
With this access level, users can view and modify the reports it contains and can also move them to/from any other folders they have access level as Editor or Manager.

3. Manager:
With this access level, users can do everything Viewers & Editors can do, plus they can also control other user's access levels to this folder. Also, users with Manager Access levels can delete the report.

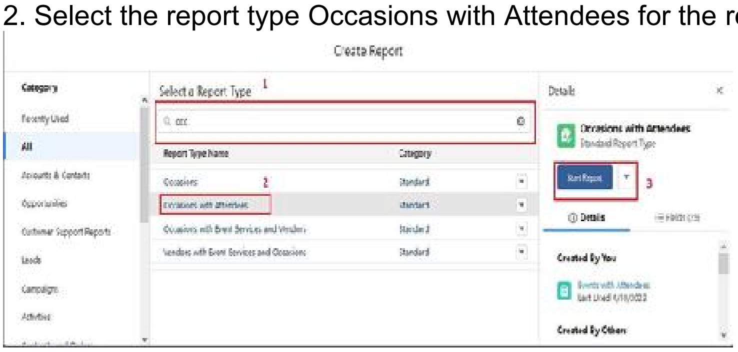
Creating A Report

1. From the Reports tab, click New Report.





2. Select the report type Occasions with Attendees for the report, and click Create.



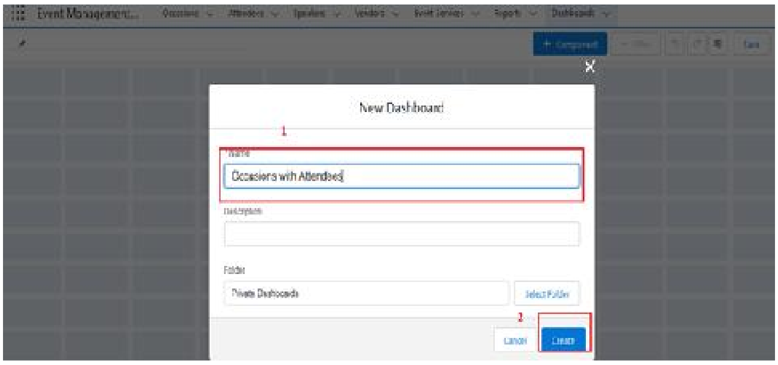
3. Customize your report accordingly and include all fields,
   Reports needs to be Grouped by one field. (ex - Created by)(require to enable add chart) then save(Occasions with Attendees) or run it.

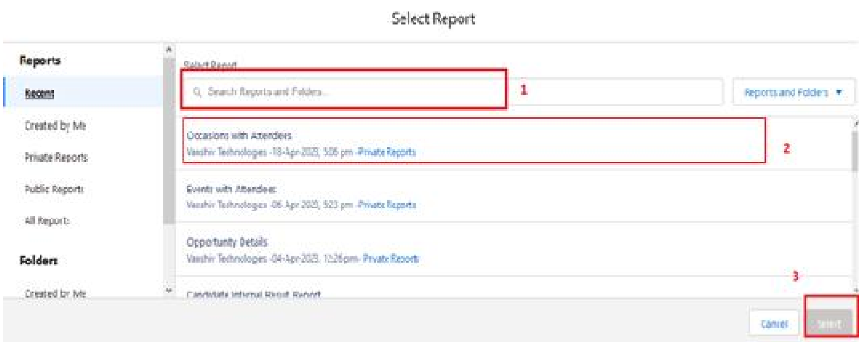
Dashboard

Dashboards provide more insights than reports as they combine the data from many reports and show a summarized result. Looking at many reports at a time gives the flexibility of combining the results from them quickly. Also summaries in dashboards help us decide on action plans quicker. The dashboards can contain charts, graphs and Tabular data.

Create A Dashboard

1. Click the Dashboards tab.
2. Click New Dashboard.
3. Name the dashboard Occasions with Attendees and click Create.
4. Click +Component.
5. Select Occasions with Attendees and click Select.
6. Select the Vertical Bar Chart component and click Add.
7. Click Save and then Done.

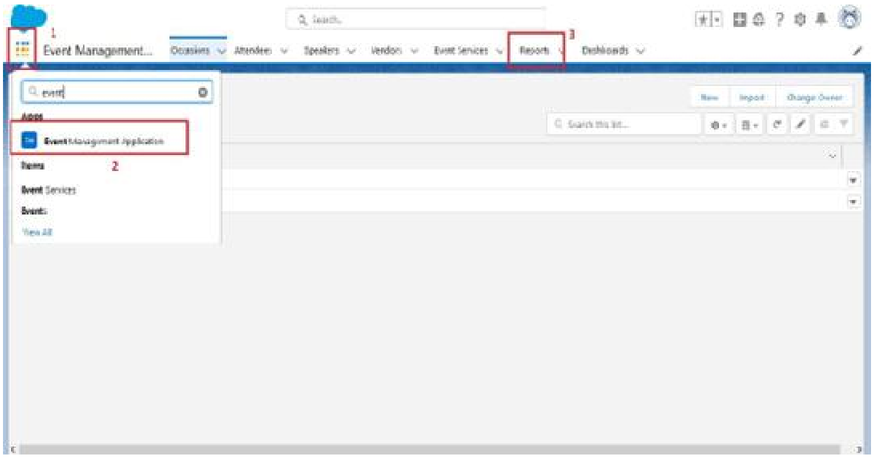


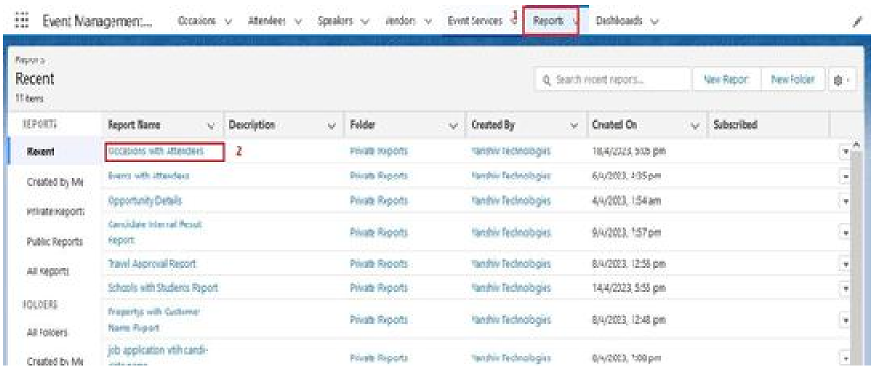


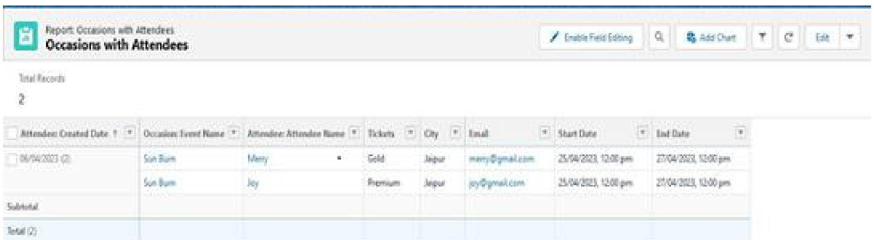
View Reports And Dashboards

View Report

- Click on App Launcher on left side of screen.
- Search Event Management & click on it.
- Click on Reports Tab.
- Click on Occasions with Attendees & see records

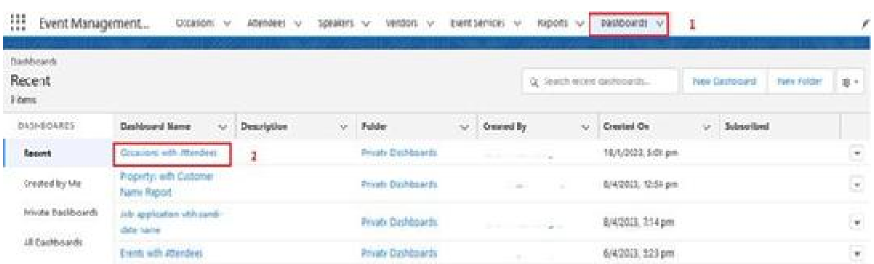






View Dashboard:

- Click on App Launcher on left side of screen.
- Search Event management & click on it.
- Click on Dashboard Tab.
- Click on Occasions with Attendees & see records



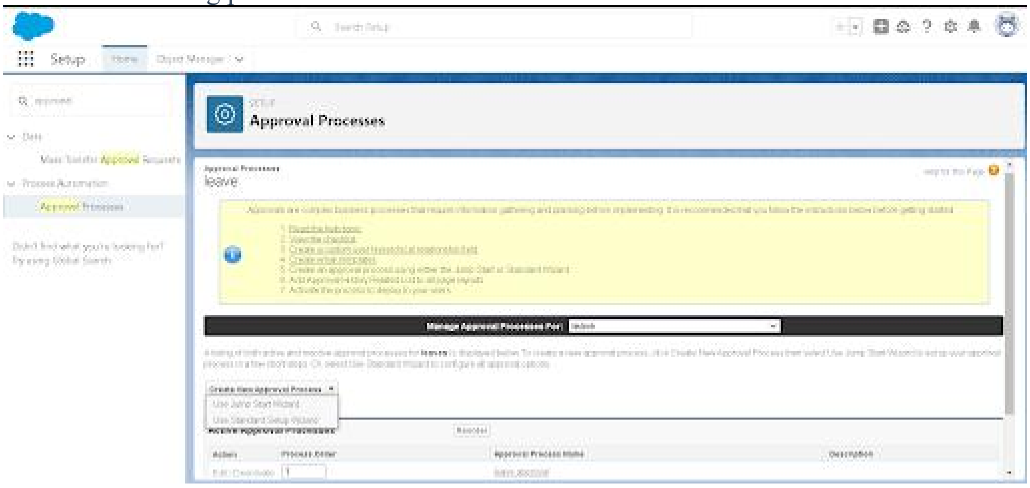
Approval Process:

The approval process in Salesforce is a powerful tool that allows you to automate and streamline the approval of records such as opportunities, leads, cases, and custom objects. It is a workflow process that is triggered when a record meets certain criteria and requires approval from one or more approvers before it can be moved forward in the sales process.

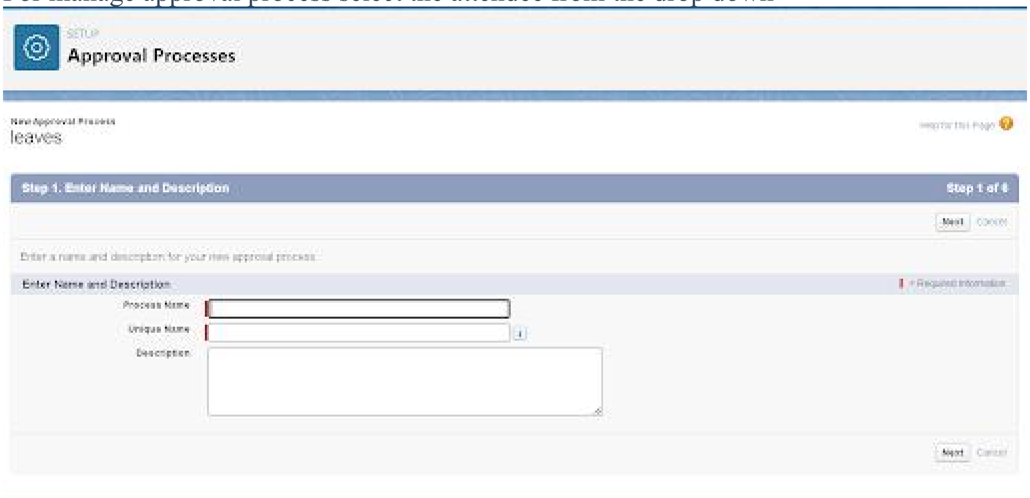
Approval Process:

Click Setup and select Setup.

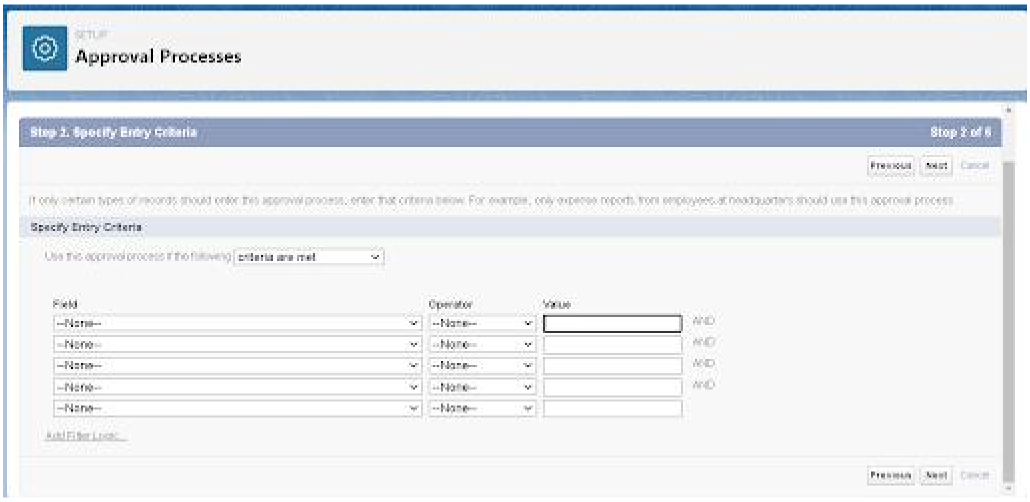
1. Select Process Automation | Approval Processes (or use the Quick Find and search for Approval Processes)
2. In the Manage Approval Processes For list, select Travel Approval.
3. Click Create New Approval Process and select Use Jump Start Wizard.
4. Enter the following parameters



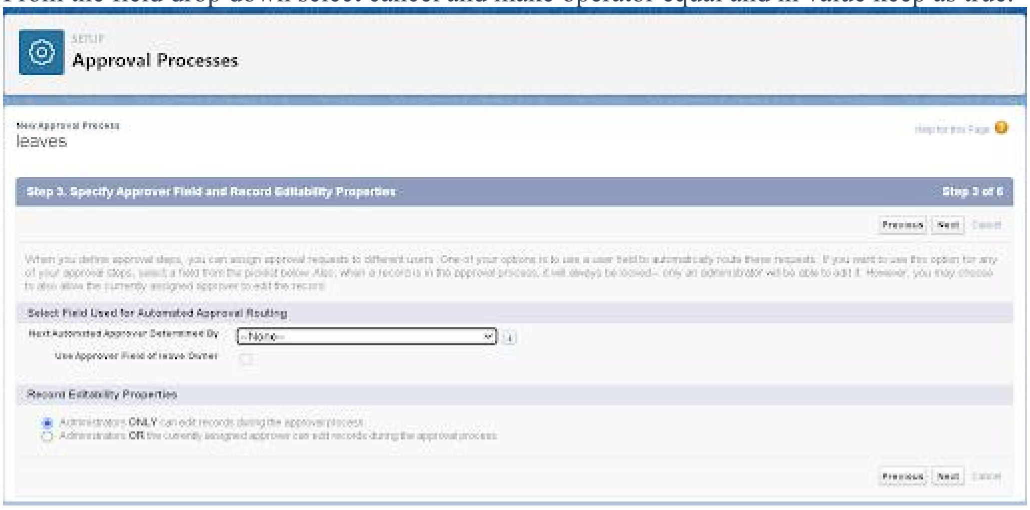
5. For manage approval process select the attendee from the drop down



6. For the process name : Attendee approval process
   Unique name: Attendee_approval_process
   Click on next.

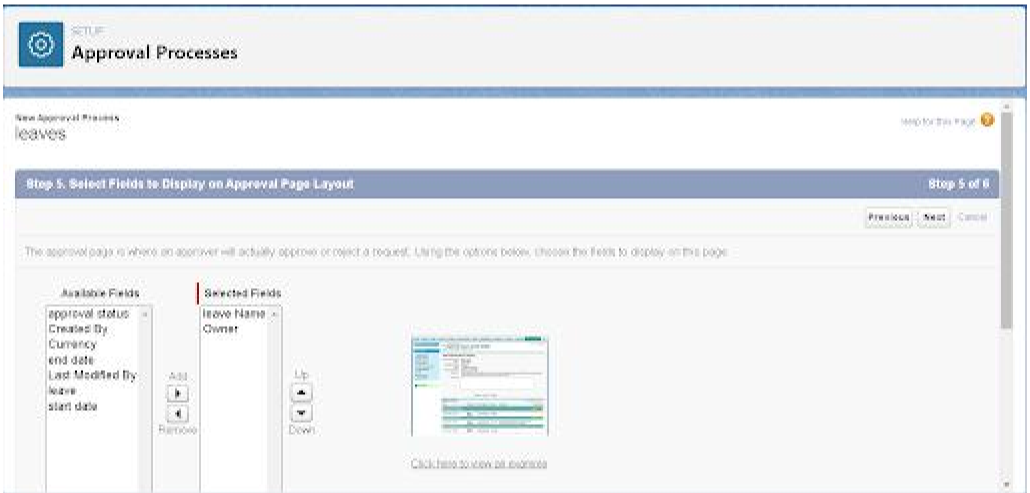


7. From the field drop down select cancel and make operator equal and in value keep as true.

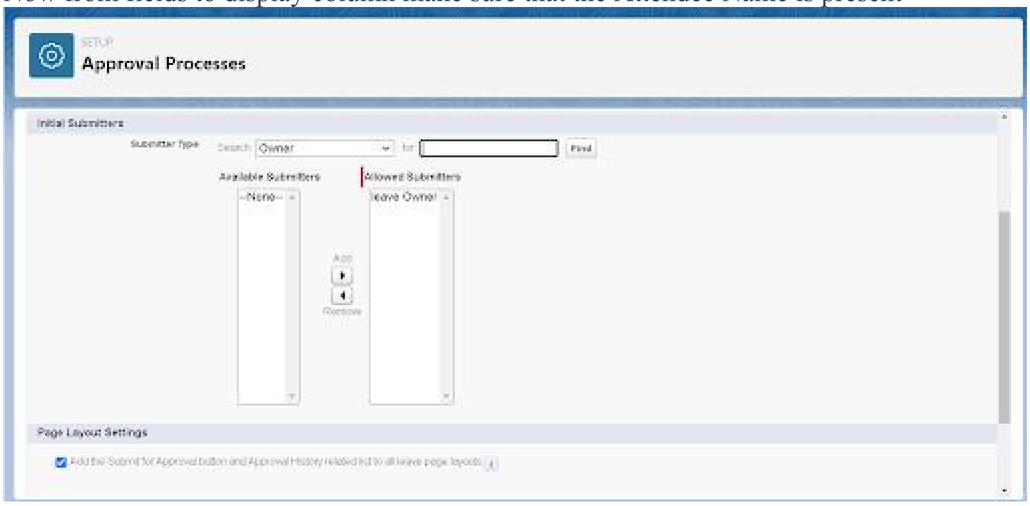


8. Leave as default

9. Leave as default.

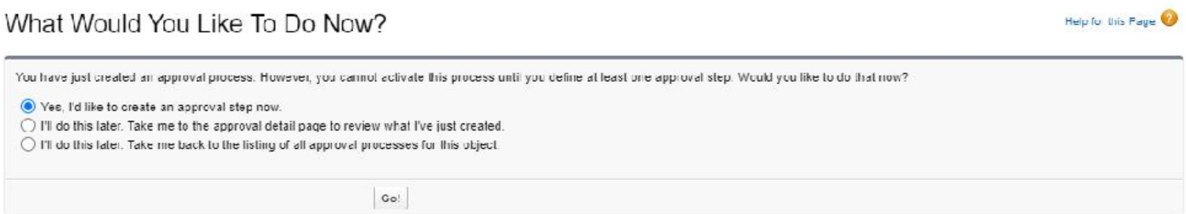


10. Now from fields to display column make sure that the Attendee Name is present



11. From the submitter type select owner and make sure that the record creator must be present in the allowed submitter section and click on save.

12. Then there will be dialogue box appear and select the no i will do it later



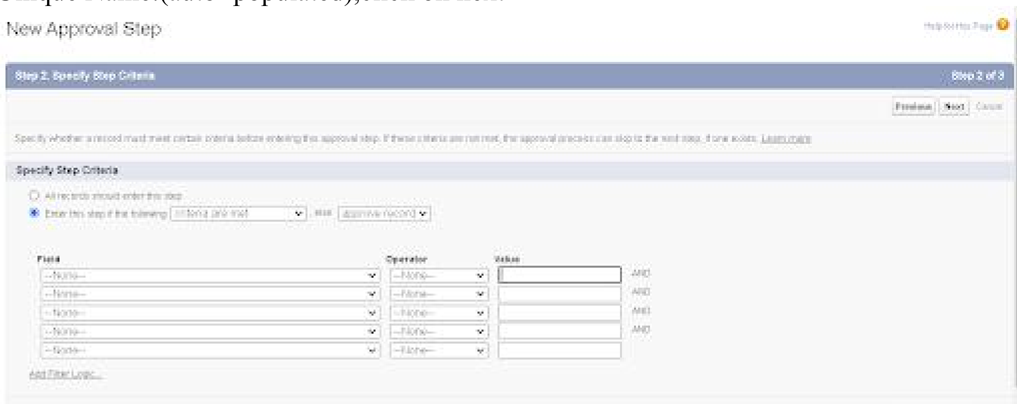
13. Now under Initial Submission action:

14. Click on new and select the field update and give the following details:

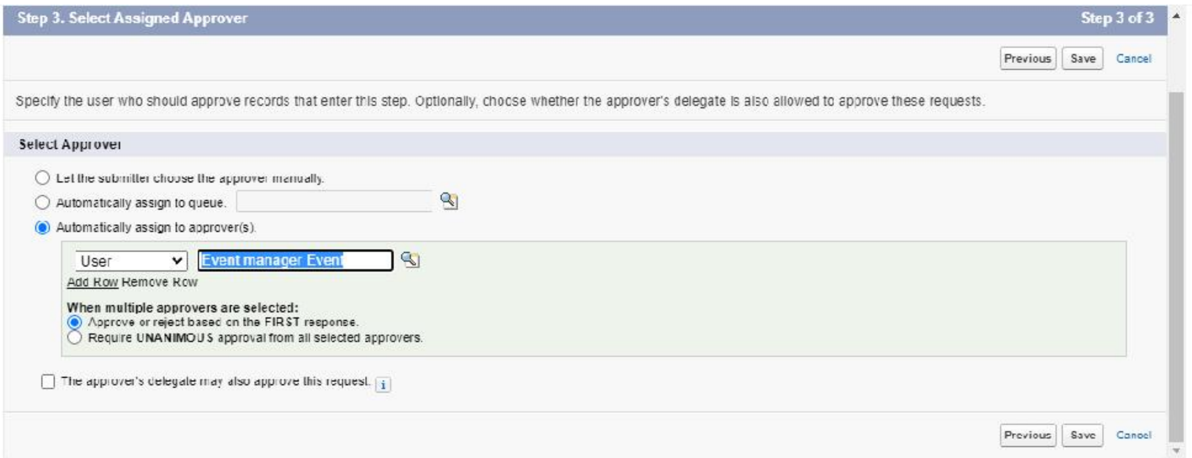
Name: Cancel Status
Unique Name: Cancel_Status
Field to update: Cancel Status
And keep value and pending.

15. Now we will see to keep the approval steps.

Name: Attendee records with cancel checkbox true
Unique Name:(auto -populated),click on next

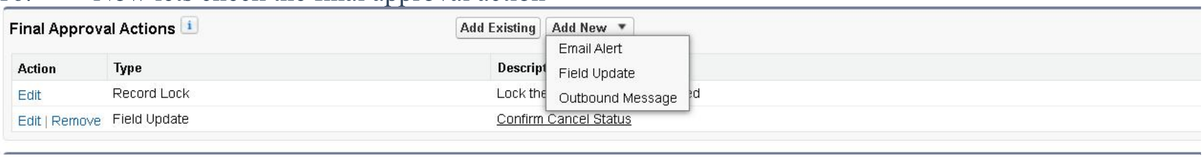


Select enter this is following Criteria is met
From field drop down Select cancel and from operator drop down select equals and on value make it true



Now select the automatically assign to the approver and select user and keep the user as created user..

16. Now lets check the final approval action



Select the new and select the field update and give the following details.

Name: Confirm Cancel Status
Select field to update :Status
And keep the new value as: Confirm

17. Now let's check the Final rejection action. click on new and select the field update and enter the following
details.

18. Name: Not confirmed cancel Status
Field to update: Cancel Status
keep value as : Not confirmed
19. And make the approval Process active.

CONCLUSION: Event Management System is user friendly and cost effective system, it is customized with activities related to event management life-cycle. It provides a new edge to management industry. SolutionDot always keep your objectives and goals on top priority while developing any plan of work.[1]